



Tuition Benefit Reimbursement Application

(Form ER75, R. 11/08)

RETURN THE APPLICATION TO:

Training & Development Services
Department of Employee Relations
200 E. Wells Street, Room 706
Milwaukee WI 53202-3515
Phone: 414.286.3650 / Fax: 414.286.0800
Email: jkamme@milwaukee.gov
www.milwaukee.gov/der/TuitionBenefit

INSTRUCTIONS: Please use black ink only; do not use a pencil. Sign and attach a copy of a PAID RECEIPT and completion statement (i.e., grade report, certificate, letter of successful completion, etc.).

APPLICANT INFORMATION (continued on page 2):

NAME (first, last):		(WORK): Full-Time <input type="checkbox"/> Part-Time <input type="checkbox"/>
DEPARTMENT:		Employee I.D. #:

After your application is reviewed and processed, you will receive an Approval Determination Letter via Email. The letter will let you know on which paycheck the reimbursement will be added. Please check one of the following:

- ☐ I have neither a personal or work **Email** address; mail the letter to my home.
☐ **Email** the Approval Determination Letter to the following **Email** address:

PLACE A CHECK MARK IN THE COLUMN BELOW IF YOU ATTENDED THE COURSE ON CITY TIME (not on your own time).

COURSE TITLE	City Time	Start Date (mo/day/year)	End Date (mo/day/year)	TUITION COST
1)				\$
2)				\$
3)				\$
4)				\$

List the name of **EACH** textbook title, equipment and supply cost **INDIVIDUALLY**. Reimbursement only covers required textbooks. If your bargaining unit is eligible for equipment and supply reimbursement, list the names of **ALL** items and costs **INDIVIDUALLY** or this application will be returned to you. The Tuition Benefit **DOES NOT** cover sales tax or shipping/handling fees. **NOTE:** *** Not all bargaining units are eligible for equipment or supply reimbursement. List additional items on a separate sheet, along with the cost and name/title of each item.

TEXTBOOK TITLE / EQUIPMENT / SUPPLY DESCRIPTION	COST (without sales tax)
1)	\$
2)	\$
3)	\$
4)	\$
5)	\$

For Employee Relations' use only. DO NOT WRITE IN THIS SECTION.

_____ Approved	Tuition	Textbooks	Equipment or Supplies***	Total:
_____ Not Approved	1)			\$
Previous Reimbursement:	2)			\$
\$	3)			\$
Pay Date:	4)			\$
Pay Code: 927 / 928 / 929	TOTAL Reimbursement: \$			

DO NOT give a Course Description, but rather, **EXPLAIN** how the course(s) relate to your current position or to a reasonable promotional opportunity within City government. If the course(s) are electives towards a degree you are seeking, state your **MAJOR**, and explain how the degree relates to your present position or to a promotional opportunity.

**THIS SECTION AND ALL SECTIONS BELOW MUST BE COMPLETED
OR THE APPLICATION WILL BE RETURNED TO YOU.**

TYPE OF COURSE(S) TAKEN:

- | | |
|---|---|
| <input type="checkbox"/> Undergraduate-Level Course (<i>Associate or Bachelor's Degree</i>) | <input type="checkbox"/> Correspondence or Online Course(s) |
| <input type="checkbox"/> Graduate-Level Course (<i>Master's Degree or Ph.D.</i>) | <input type="checkbox"/> Continuing Education Credit |
| <input type="checkbox"/> Other: _____ | <input type="checkbox"/> Certificate Program Course(s) |

Have you received a grant, scholarship or state/federal veteran's benefit for the course(s) listed on this application?

No ☐ YES ☐ **If Yes**, you may receive reimbursement for any tuition **not** covered by the grant, scholarship or veteran's benefit. **If Yes**, how much did you receive? \$_____: **CHECK ONE:** ☐ per Class ☐ per Semester
Which benefit(s) did you receive? ☐ Grant / ☐ Scholarship / ☐ State or Federal Veteran's Benefit

- I have read the instructions and Administrative Guidelines and I agree to abide by them.
- I understand my Department/Agency Head and Employee Relations must approve this application if I take the course on "City Time" and not on my own time. **(Not all bargaining units are eligible for "City Time.")**
- If I register for a course offered by Employee Relations (DER) and fail to cancel by the cancellation date, do not attend, or do not pass or complete the course, I agree to pay for the full course registration fee. Otherwise, I authorize the course registration fee to be deducted from my paycheck.

**Please Sign
Here →**

Date:

If you attended the course(s) on your "own time" you may mail or fax this application AND all required documents directly to Training & Development Services.

DEPARTMENT/AGENCY HEAD SIGNATURE AND APPROVAL

- The courses are directly related to the applicant's present position or to a reasonable promotional opportunity within City government.
- The courses indicated taken "on City Time" are approved to be on City Time.

**Dept/Agency Head
Signature: →**

Date:

**Supervisor's Initials:
(optional)→**

Date:

PLEASE DO NOT RETURN THIS PAGE WITH YOUR COMPLETED APPLICATION.

- ☒ Please use the **ER75-A** form to apply for Membership Dues Reimbursement.
- ☒ Please use the **ER75-C** form to apply for License or Certification fees. ***NOTE: Only City management is eligible for this benefit.***
- ☒ Please use the **ER75-D** form to apply for conferences, conventions, seminars or courses of **less** than three (3) weeks in length (***non college-level***).

INSTRUCTIONS FOR FORM ER75

1. **You must apply for reimbursement as soon as possible, but within four (4) months of successful course completion.**
2. **Please read the Administrative Guidelines on Page 4.**
3. **Complete the “Applicant Information” sections on Page 1 and 2 of the application.** Complete **all** Sections in full or the application may be returned to you, which will delay the reimbursement.
4. **Attach a photocopy of one of the following** (*please staple the completion statement to the back of the application*):
 - a. Official grade report (*must be a “final” grade; “Mid-Term” grade reports are not acceptable*).
 - b. Certificate of completion
 - c. Letter from the school or organization that states you successfully completed the course(s).
5. **Attach a photocopy of a receipt that shows the tuition been paid for.** Please do not submit originals, as they will not be returned to you. Please staple receipts to the back of the application.
6. **If you took a course for which textbooks were required,** attach a copy of a receipt. Please note that the Tuition Benefit only covers **required** textbooks. Please do not submit originals as they will not be returned to you. Please staple receipts to the back of the application.
7. **If you took a course for which equipment or supplies were required,** attach a copy of a receipt. Please note that the Tuition Benefit **does not** cover required equipment and supplies for all bargaining units. ***NOTE:*** Not all bargaining units are eligible. Please see the Tuition Benefit Amounts Chart.
8. **If you are taking courses on “City time”** and not on your own time, please forward the completed application, along with all necessary documentation **directly** to your Supervisor or Department Head for approval and signature. ***NOTE:*** Not all bargaining units are eligible to take courses on “City Time.” Courses taken on “City time” must be directly related and critical to your present position.
9. **If you are taking the courses on your own time,** please mail or fax (286-0800) the completed application, along with the necessary documents directly to Training & Development Services, Room 706, City Hall.
NOTE:
10. **The applications are reviewed and processed in the order in which they are received. In general, you will receive the reimbursement within 8 weeks from the date Training & Development Services received your completed application and required documentation. The reimbursement is added to your regular payroll check and is non-taxable (the approval determination letter will have the check date on it).**

NOTE ON RECEIPTS:

- Whenever possible, copy **all** receipts unto **one** piece of paper (8½" x 11"). Submit only photocopies; originals are not returned.
- Submit a copy of the completion statement (i.e., *grade report, certificate or letter of successful completion*) on a **separate** piece of paper. Please see the Administrative Guidelines for more details on receipts.
- STAPLE all documents to the back of the application.

KEEP THIS PAGE FOR YOUR RECORDS – DO NOT ATTACH TO APPLICATION.

TUITION BENEFIT ADMINISTRATIVE GUIDELINES

- **"On City-Time" Use of Tuition Benefit:** Some unions and employee groups are eligible to take CRITICAL, JOB-RELATED COURSES on City-Time. Your Department/Agency Head and Employee Relations must approve courses. ALL other courses, seminars and conferences must be taken on the employee's own time. Please call 286-3387 with any questions or send an email to aknick@milwaukee.gov. NOTE: **Not** all bargaining units are eligible to use the Tuition Benefit for "on City-time" courses.
- **You must submit the application** and all required documentation as soon as possible, but within four (4) months of successful completion of a course.
- **Part-Time Employees:** Part-Time employees are eligible for prorated Tuition Benefit provided they work a minimum of 40 hours per pay period. Employees working less than 40 hours per pay period are not eligible for the Tuition Benefit.
- **A valid receipt is required** for ALL course, seminar, convention, conference and membership dues reimbursement requests. However, courses offered in Employee Relations' Bulletin of Courses do not require a receipt, as there is no upfront payment.
- **Definition of an Acceptable Receipt:** Receipts MUST show that payment was made, as well as the amount paid. Examples of acceptable receipts include: cash register receipt, canceled check (copy of both sides required), money orders, credit card statements, or official receipts provided by the school or organization. Bank statements are acceptable when accompanied by a copy of the front of the check or check carbon.
- **Unacceptable receipts include** invoices or registration forms requesting payment, receipts that show payment was made by another person, or receipts that are not legible.
- **Approval Determinations for Courses:** If you want to know in advance if a course will be approved for reimbursement, please call 286-3650 or 286-3387. Courses must be taken at accredited institutions, schools or organizations approved by Employee Relations. The reimbursement is based on courses taken during the calendar year (January - December) and is **always** applied to the year in which a course begins.
- **Approval Determination for Membership Dues:** If you want to know in advance if a membership will be approved for reimbursement, please call 286-3650 or 286-3387. Not all bargaining units are eligible for membership dues. Organizations MUST be nonprofit, nonsectarian and established for the expressed purpose of providing information, resources and programming that benefit its members in their professional specialties. Membership dues are applied to the year in which the enrollment period begins. Membership dues reimbursement DOES NOT include union dues.
- **Grade Reports and Completion Statements:** For college courses, the minimum grade accepted as satisfactory completion is a final grade that represents the minimum grade point average required for a degree, diploma or certificate. "Mid-Term" grade reports are NOT acceptable. Conferences, conventions and seminars DO NOT require a grade report or completion statement.
- **Tuition Reimbursement and Membership Dues Benefits Do Not Cover:** Non-required textbooks, union dues, finance charges, sales tax, licenses, certifications, examinations, shipping/handling charges, late and administrative fees, travel expenses (IE: lodging, meals, mileage), parking fees, magazine/journal/ periodical subscriptions, equipment or supplies. Certain bargaining units are eligible for REQUIRED equipment and supply reimbursement.
- **Seasonal Layoff and Unpaid Leaves of Absence:** If you have started a course prior to going on seasonal layoff or an unpaid leave of absence, you will receive your reimbursement check when you return to work. You must still send in the application, receipts and completion statements within eight weeks of the end of the course. However, if you start a course while on an unpaid, involuntary Leave of Absence or Layoff, you are not eligible to receive reimbursement.
- **Taxes:** ALL courses, seminars and conferences, and membership dues are nontaxable. The reimbursement is added to your gross total, but not to taxable earnings and NO withholdings will be taken.
- **Resignations from City Employment:** If you resign from City employment within six months of receiving a Tuition Benefit, that amount will be withheld from your final paycheck. This does not apply to those who retire, transfer to the School Board, or whose positions are eliminated due to budget cuts. You will not receive reimbursement for a class if you leave prior to completing it.

KEEP THIS PAGE FOR YOUR RECORDS – DO NOT ATTACH TO APPLICATION.

WHAT THE TUITION BENEFIT DOES NOT COVER:

- Airfare
- Certification fees and renewals (*only general City management are eligible*)
- Courses where the tuition was paid for by a grant, scholarship or State/Federal veteran's benefits.
- Courses, seminars or conferences that began or were attended prior to City employment.
- Courses, seminars or conferences that began or were attended during an **unpaid** and/or voluntary leave of absence (i.e., voluntary layoff, educational leave of absence, etc.)
- Courses taken on "City" time (**see #3 below**)
- Equipment or supplies (i.e., calculators, disks, software, notebooks, paper, pencils, etc.) (**see #1 below**)
NOTE: The equipment and supplies must be REQUIRED in a successfully completed class (for those eligible to receive equipment and supply reimbursement).
- Examination Fees
- Finance charges
- I.D. fees
- Interest Charges
- Late fees
- License fees and renewals (*only general City management are eligible*)
- Lodging
- Meals
- Membership dues reimbursement (**see #2 below**)
- Mileage
- Parking fees
- Part-time employees with less than 40 hours per pay period are **not** eligible for the Tuition Benefit.
- Sales tax
- Shipping and handling charges
- Subscriptions to magazines, journals or periodicals (this also applies to Membership Dues reimbursement)
- Textbooks that were NOT required in a successfully completed course
- Transfer of Credit fees
- Union dues

Seasonal Layoffs and Leaves of Absence

If you started a course prior to going on a seasonal layoff or unpaid leave of absence, you will receive your reimbursement when you return to work. However, if you start a course while on an unpaid and/or voluntary leave or layoff, you are not eligible to receive reimbursement.

NOTES:

1. Certain bargaining units are eligible to receive reimbursement for **required** equipment and/or supplies for a successfully completed course.
2. Certain bargaining units and employee groups are eligible for Membership Dues reimbursement.
3. Certain bargaining units and employee groups are eligible to take courses on "City Time" provided the course or seminar is critical to and directly related to the employee's present position.